

# 10 Small Purchase Instructor Guide

## Review Training Management Guide

### Handouts

- ✓ Introduction
  - Name Tents
  - BidBuy General Overview
- ✓ Small Purchase Training
  - 10 Small Purchase Training Presentation
  - 10 BidBuy Example Small Purchase LED Street Lights ReqPO (under \$10K procurement)
  - 10 BidBuy Example Small Purchase LED Street Lights ReqBidPO (over \$10K procurement)
- ✓ Post Training Distribution
  - 10 BidBuy Example Small Purchase Computer Tutorial Guides ReqPO (under \$10K Procurement)
  - 10 BidBuy Example Small Purchase Computer Tutorial Guides ReqBidPO (over \$10K procurement)
  - 10 PROCESS Small Purchase
  - 10 Small Purchase Manual

### Pre-Training Setup

Document Type	Action
Practice	Practice Exercise: 10 BidBuy Example Small Purchase LED Street Lights ReqPO
Practice	Practice Exercise: 10 BidBuy Example Small Purchase LED Street Lights ReqBidPO
Practice	Practice Exercise: 10 BidBuy Example Small Purchase Computer Tutorial Guides ReqPO
Practice	Practice Exercise: 10 BidBuy Example Small Purchase Computer Tutorial Guides ReqBidPO
Print Document	Print Presentation: 10 Small Purchase Training Presentation
Print Document	Print Exercise: 10 BidBuy Example Small Purchase LED Street Lights ReqPO
Print Document	Print Exercise: 10 BidBuy Example Small Purchase LED Street Lights ReqBidPO

### Timeline

Session I	10 min.	Introduction to Small Purchase
	10 min.	Create Open Market Requisition with Informal Bid Demo
	15 min.	Create Open Market Requisition with Informal Bid Hands-on
	5 min.	Tabulate Informal Quote Demo
	10 min.	Tabulate Informal Quote Hands-On
	15 min.	Break (say 10 minutes)
	10 min.	Process Purchase Order Demo
	15 min.	Process Purchase Order Hands On
	5 min.	Change Order Demo
	10 min.	Change Order Hands-On
	15 min.	Break (say 10 minutes)
	5 min.	Small Purchase Over \$10,000 Review
	45 min.	Small Purchase Req to Bid to PO Demo and Hands-On
	5 min.	Small Purchase Review and Closing

## Presentation - Small Purchase

Small Purchases are procurements that are less than the determined threshold limits for the specific good or service

- ✓ The thresholds are subject to change annually



### Overview

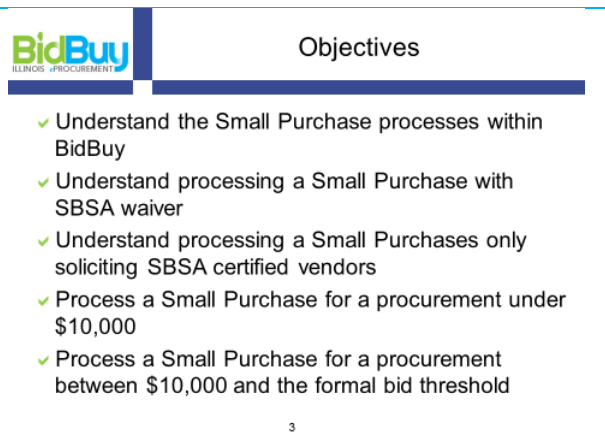
The Overview provides a brief highlight of what is to be covered in the Presentation and the BidBuy Demo.



### Objectives

After attending the Small Purchase training, the attendees will have an understanding of the Small Purchase process in BidBuy.

- ✓ **SBSA** Waiver - Small Business Set Aside Waiver
- ✓ There are two processes used for Small Purchases:
  - Process for Small Purchases under \$10,000.00, and
  - Process for Small Purchases \$10,000 and above



## What is a Small Purchase?

Purchases must be less than the current small purchase threshold limits to qualify to use this process

- ✓ The current threshold is **\$50,400**
- ✓ The threshold is subject to change each year



## What is a Small Purchase?

- ✓ Procurements less than the determined small purchase threshold limits for the specific goods or services
  - Annually, thresholds are subject to change
- ✓ Public publication of the procurement steps is not required for small purchases

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## Process Steps

There are two different process views for the Small Purchase on the next seven slides :

- ✓ **Process Steps – 4 slides**
  - Process Steps under \$10,000
  - Process Steps from \$10,000 to the Small Purchase Threshold
- ✓ **Process Flow Diagrams – 3 slides**
  - Requisition with informal Quote
  - Informal Quote on Requisition
  - Create PO Agreement



## Process Steps

## Process Steps under \$10,000

Agencies can obtain pricing from vendors using Informal Bids on the Requisition document for Small Purchases under \$10,000.00.

### If an SBSA Waiver is not received, the following process applies:

- ✓ Create an Open Market Requisition
- ✓ Publish Informal Bid on the Requisition
  - Add only SBSA Certified Vendors registered for the NIGP Code(s)
  - Select Restricted informal bid, only selected vendors can view and respond
- ✓ Review Informal Quotes received from Vendors
- ✓ Tabulate and Recommend Vendor
- ✓ Submit Requisition for Approval

### If an SBSA Waiver is received, the following process applies:

- ✓ Create an Open Market Requisition
- ✓ Publish Informal Bid on the Requisition



## Process Steps – Under \$10,000



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<ul style="list-style-type: none"> <li>○ Add Vendors registered for NIGP Codes</li> <li>○ Select Unrestricted informal bid, all vendors can view and respond</li> <li>✓ Review Informal Quotes received from Vendors</li> <li>✓ Tabulate and Recommend Vendor</li> <li>✓ Submit Requisition for Approval</li> </ul>	
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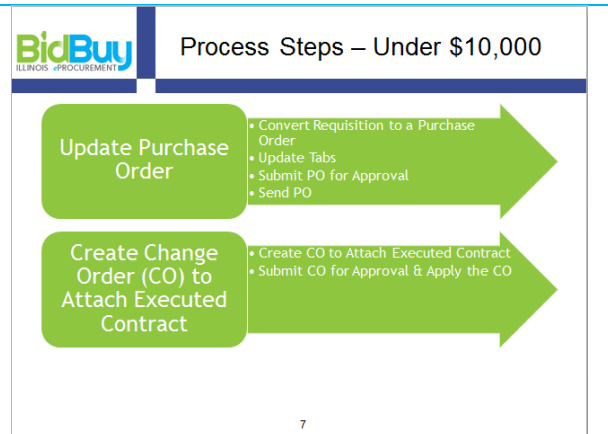
### Process Steps under \$10,000

#### Upon approval of the Requisition, a Basic Purchasing User converts to a Purchase Order

- ✓ Convert Requisition to a Purchase Order
- ✓ Update Tabs
- ✓ Submit PO for Approval
- ✓ Send the PO to Vendor

The Small Purchase exercise also includes the creation of a PO Change Order.

- ✓ Create a PO Change Order and add Attachment
- ✓ Submit Change Order for Approval
- ✓ Apply the Change Order



### Process Steps \$10,000 to Small Purchase Threshold

Small Purchases \$10,000.00 to the Small Purchase Threshold will be processed by converting the Requisition to a Bid document to obtain pricing from vendors.

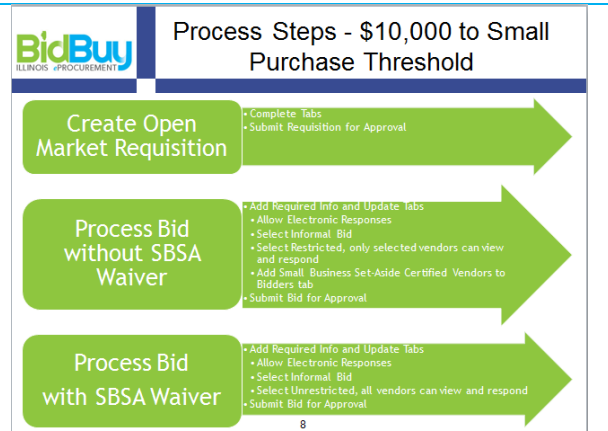
#### Create Open Market Requisition

- ✓ Create Open Market Requisition
- ✓ Complete Tabs
- ✓ Submit Requisition for Approval

#### Process Bid without SBSA Waiver

- ✓ Convert Requisition to Bid
- ✓ Update the Bid document, important areas to focus include:
  - General Tab:
    - Allow Electronic Responses
    - Select Informal Bid
  - Bidders Tab:
    - Select Restricted, only selected vendors can view and respond
    - Add only SBSA Certified Vendors registered for the NIGP Code(s)
- ✓ Submit Bid for Approval

#### Process Bid with SBSA Waiver



- ✓ Convert Requisition to Bid
- ✓ Update the Bid document, important areas to focus include:
  - General Tab:
    - Allow Electronic Responses
    - Select Informal Bid
  - Bidders Tab:
    - Select Unrestricted, all vendors can view and respond
    - Add Vendors registered for the NIGP Code(s)
- ✓ Submit Bid for Approval

### Process Steps \$10,000 to Small Purchase Threshold

#### Publish Bid

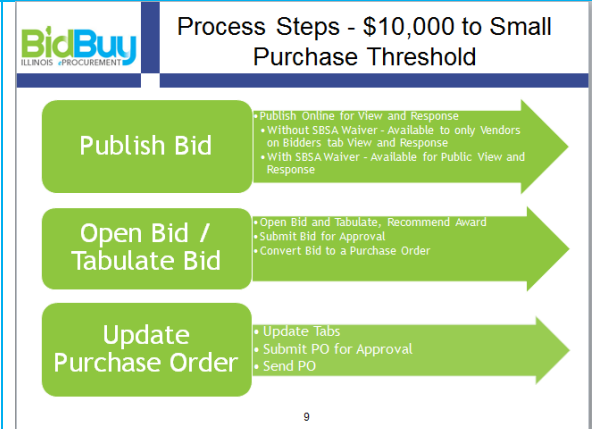
- ✓ Publish Online for view and response
  - Without SBSA Waiver – Available only to vendors on Bidders Tab to view and respond
  - With SBSA Waiver – Available for public view and response

#### Open and Tabulate Bid

- ✓ Open the Bid – Tabulate and Recommend Award
- ✓ Submit Bid Tab for Approval

#### Update Purchase Order

- ✓ Convert Bid to a Purchase Order
- ✓ Review and update Purchase Order
- ✓ Submit PO for Approval
- ✓ Send PO

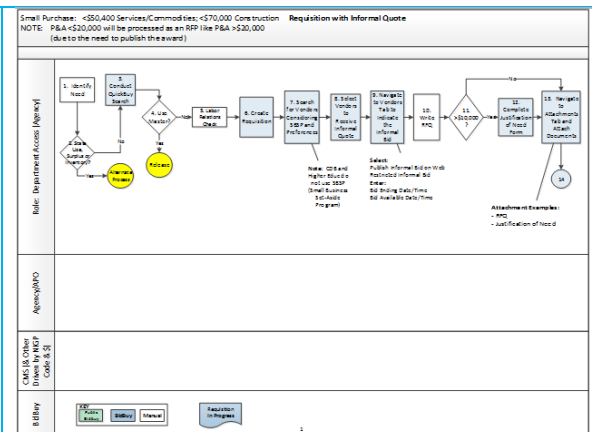


### Requisition with Informal Quote (1 of 3)

#### Small Purchase Requisition with Informal Quote

This is a traditional flow diagram from:

- ✓ Identify Need > Add attachments





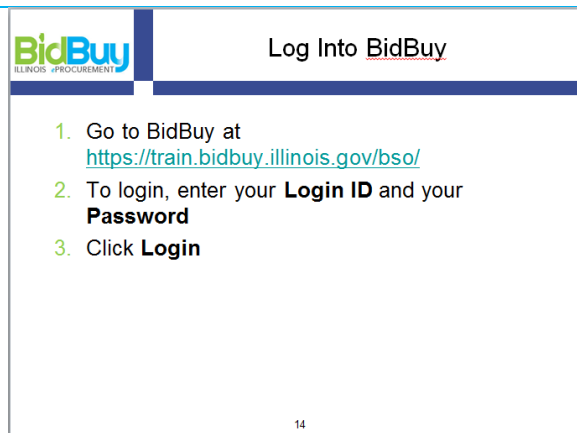
presentation to convert to Purchase Order for processing.

- ✓ Convert the Requisition to Purchase Order
- ✓ Process and Send the PO
- ✓ Create a Purchase Order Change Order

There will be stops in between each topic for the class to recreate the steps just performed.

### Log into BidBuy

The login process is the first step when entering BidBuy



**Log Into BidBuy**

1. Go to BidBuy at <https://train.bidbuy.illinois.gov/bsol/>
2. To login, enter your **Login ID** and your **Password**
3. Click **Login**

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### Create Open Market Requisition

The following details steps to create the Requisition

- ✓ Create a New Requisition
  - Documents > Requisition > New
- ✓ Requisition Type - Open Market
- ✓ Complete the Requisition tabs
- ✓ Notify Vendors of the Informal Bid

**Remember to stop before submitting for approval**



**Create Open Market Requisition**

**Step 1:** Click Documents > Requisitions > New

**Step 2:** Complete Tabs

**Step 3:** Notify Vendors of Informal Bid

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## Instructor Online - Create Requisition

### Create Open Market Requisition

- ✓ Demo Steps to create the Small Purchase Requisition

Instructor does the following and then turns over to users to do.

#### New Requisition

<p>Initiate a new Requisition document.</p> <p>On the Navigation Bar:</p> <ul style="list-style-type: none"> <li>✓ Click Documents</li> <li>✓ Hover over Requisitions</li> <li>✓ Select New</li> </ul> <p>The following sections guide the instructor tab by tab through the Requisition document.</p>	<ul style="list-style-type: none"> <li>✓ Documents &gt; Requisitions &gt; New</li> </ul>
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#### General Tab

<ul style="list-style-type: none"> <li>✓ Short Description- Specific and precise description</li> <li>✓ Department/Location – Defaults to the user creating the document's default, can be modified</li> <li>✓ Requisition Type – Must be <b>Open Market</b></li> <li>✓ Type Code – Select best choice based on what is being requested</li> </ul> <p>Once the required information (fields designated with an asterisk “*”) on the General tab has been entered and saved, a requisition number will be automatically assigned and the user may navigate to other tabs.</p>	<ul style="list-style-type: none"> <li>✓ Short Description: Small Purchase LED Street Lights</li> <li>✓ Department: Default</li> <li>✓ Location: Default</li> <li>✓ Requisition Type: Open Market</li> <li>✓ Type Code: Commodities</li> </ul>
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#### Items Tab

<p>Enter items into the requisition by selecting <b>Add Open Market Item.</b></p> <ul style="list-style-type: none"> <li>✓ Description – add detailed description, up to 4,000 characters allowed</li> <li>✓ Quantity – quantity required</li> <li>✓ Cost – estimated cost</li> <li>✓ UOM – Select appropriate for item being requested</li> <li>✓ NIGP Class and NIGP Class Item – add by using lookup (magnifier), dropdown, or key in value</li> <li>✓ Additional NIGP Codes – additional NIGP codes can be added</li> <li>✓ Select Save &amp; Exit when complete with Item updates</li> </ul>	<ul style="list-style-type: none"> <li>✓ Short Description: Small Purchase LED Street Lights</li> <li>✓ Quantity: 30</li> <li>✓ Unit Cost: 250</li> <li>✓ UOM: EA</li> <li>✓ NIGP Class Code: 285</li> <li>✓ NIGP Item Code: 76</li> </ul>
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### Vendor Tab

The Small Purchase is under \$10,000.00, so we will be publishing an Informal Bid on the Requisition document. Due to this process, we will come back to the Vendors tab after completing the subsequent tabs.	<ul style="list-style-type: none"> <li>✓ No Action required, briefly explain</li> </ul>
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### Address Tab

The Requisition Address is auto populated by the default for the user's setting on <b>Ship-to Address</b> and <b>Bill to Address</b> .	<ul style="list-style-type: none"> <li>✓ Address: Use Default</li> </ul>
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### Accounting Tab

<p>This is accounting information for all items for the Req. We are selecting the main Accounting Tab. To add unique account codes for individual items, go to <b>Items</b> tab and select <b>Accounting</b> sub-tab.</p> <p>Accounting will be required on all Small Purchase Requisitions, and is important for processing approvals.</p> <p>Stress importance of selecting <b>Save Based on Percentages</b> and then <b>Rebuild for All Items</b> after an Account Code is added to the document.</p> <ul style="list-style-type: none"> <li>✓ <b>Save by Dollars</b> -to automatically fill in the correct percentages based on the dollar amount entered</li> <li>✓ <b>Save by Percentages</b> - to automatically fill in the correct dollar amounts based on the percent entered (This will be used in training)</li> <li>✓ <b>Rebuild for All Items</b> - this applies the accounting to the item or items we added. Until we do this, accounting is not applied</li> </ul>	<p>Account Code:</p> <ul style="list-style-type: none"> <li>✓ Click the magnifier next to Account Code box</li> <li>✓ Lookup Account screen opens, select <b>Find It</b></li> <li>✓ Select Account Code</li> <li>✓ Select <b>Save Based on Percentages</b></li> <li>✓ Select <b>Rebuild for All Items</b></li> </ul>
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### Routing Tab

<p>The routing that a requisition must follow for approval is determined by the applicable approval paths. The approval path for the requisition is displayed on the Routing Tab.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the requisition is submitted for approval.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly explain</li> </ul>
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### Attachments Tab

Attaching Files or Forms to BidBuy documents is a useful way to include specifications or other guidelines in the user's procurement documents.	<ul style="list-style-type: none"> <li>✓ Add a file from the computer directory (can be a picture) to demonstrate how to add an attachment.</li> </ul>
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<ul style="list-style-type: none"> <li>✓ <b>Files</b> = are selected from the user's computer file directory</li> <li>✓ <b>Forms</b> = Are created by a BidBuy Administrator that can be added to the document and modified within BidBuy</li> </ul> <p><u>Attachments</u> that may be added to a Small Purchase Requisition include:</p> <ul style="list-style-type: none"> <li>✓ Cloud Computing Check Sheet</li> <li>✓ New Furniture Purchase Form (Surplus Waiver)</li> <li>✓ Service Procurement and Contracting Checklist</li> </ul>	
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### Notes Tab

<p>The <b>Notes</b> tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p> <p>Only the user creating a note <u>may edit</u> their note.</p>	<ul style="list-style-type: none"> <li>✓ Write a brief demo note to show the function</li> </ul>
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### Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p> <p>Reminders are sent via email (if option selected) and display on the user's Reminders Tab.</p>	<ul style="list-style-type: none"> <li>✓ Due Date: Today</li> <li>✓ Comment: Remember to review document</li> <li>✓ Remind Whom: Your training user</li> <li>✓ Days Prior: 0</li> <li>✓ Send email: Check box</li> <li>✓ Save &amp; Continue</li> </ul>
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### Vendor Tab – Add Vendors and Notify of Informal Quote

<p>This vendor tab allows the user to publish an Informal Bid for Vendors to view and provide price quotes. To publish the Informal Bid on the Requisition document.</p> <p>The example does not have an SBSA Waiver; therefore, the Informal Bid will only include vendors with category Small Business Set Aside = Yes returned. The Informal Bid will also be Restricted informal bid, only selected vendors can view and respond.</p> <p>In the Training environment we will only select Train Vendor 1 and Train Vendor 2 to reduce email communication. The trainer will demonstrate how to search vendors based on NIGP Codes and by Vendor Category.</p>	<ul style="list-style-type: none"> <li>✓ Select Lookup &amp; Add Vendors <ul style="list-style-type: none"> <li>✓ Demo searching for vendors by NIGP Class and NIGP Class Item</li> <li>✓ Demo searching for vendors by Small Business Set Aside category = Yes</li> <li>✓ For training, only Train Vendor 1 and Train Vendor 2 will be returned: <ul style="list-style-type: none"> <li>○ Search Vendor Name: Train</li> <li>○ Select Train Vendor 1 and Train Vendor 2</li> <li>○ Select Save &amp; Exit</li> </ul> </li> </ul> </li> <li>✓ Select Publish Informal Bid On Web</li> <li>✓ Select: Restricted informal bid, only selected vendors can view and respond</li> <li>✓ Bid Ending Date: Tomorrow</li> <li>✓ Bid Available Date: Now</li> <li>✓ Select Save &amp; Continue</li> </ul>
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	<ul style="list-style-type: none"> <li>✓ Select Notify Vendors <ul style="list-style-type: none"> <li>✓ Select Vendors to notify via email</li> <li>✓ Select <b>Send Notification to Selected Vendors</b></li> <li>✓ Review email and edit as desired</li> <li>✓ Select <b>Send Notification</b> to send email</li> </ul> </li> </ul>
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### Hands-on Activity

- ✓ Attendees create Open Market Requisition for LED Street Lights
- ✓ Presenter to have the **Create Open Market Requisition** slide on the overhead and walk around to assist


## Presentation - Tabulate Informal Quotes and Recommend Vendor

### Tabulate Informal Quotes and Recommend Vendor

Vendors selected on the Vendors tab can log into BidBuy and provide price quotes. In training, the attendees will add these quotes on behalf of the vendor.

#### Enter the Informal Vendor Quotes

- ✓ Create the Informal Quote for each vendor
- ✓ Review the Informal Quotes
- ✓ Tabulate and apply price selected to the Requisition Items
- ✓ Submit for Approval

	<b>Tabulate Informal Quotes and Recommend Vendor</b>
<p><b>Step 1:</b> Enter Informal Quotes for Vendors</p> <p><b>Step 2:</b> Apply selected Pricing to Req Items and Recommend Vendor</p> <p><b>Step 3:</b> Submit Requisition for Approval</p> <p><b>Step 4:</b> Convert Requisition to PO</p>	
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## Instructor Online - Tabulate Informal Quotes and Recommend Vendor

### Tabulate Informal Quotes

- ✓ Demo steps for adding informal quotes on behalf of the vendors, tabulate and recommend vendor

Instructor does the following and then turns over to user to do.

#### Vendor Tab

This vendor tab allows the user to create, enter, modify and edit informal quotes from vendors solicited.

- ✓ Select Vendor and Create Quote
  - Enter Quoted Unit Cost
- ✓ Repeat for second Vendor

#### Return to Vendor Tab

- ✓ Select **Informal Quote Tabulation** Button
- ✓ The \*\* next to the cost indicates the lowest price, always review costs to ensure this is not due to vendor selecting "No Charge" in error
- ✓ On Informal Quote Tabulation, select **Training Vendor 1**
  - Training Vendor 1 will have \*\* next to the cost
- ✓ Check the selected vendor
- ✓ Select Apply Pricing Button
- ✓ Select Apply Selected Pricing to Req Items Button
- ✓ Close Window
- ✓ Return to Vendor Tab

The Instructor can demo the updates to the class by opening the Items tab and showing the award price applied to the item.

- ✓ Create Quote Training Vendor 1:
  - Unit Cost: \$300.00
  - Save & Exit
- ✓ Create Quote Training Vendor 2:
  - Unit Cost: \$374.99
  - Save & Exit
- ✓ Informal Quote Tabulation:
  - Review Items
  - Select Training Vendor 1
  - Select **Apply Selected Pricing to Req Items**
  - Select **Close Window**

### Summary Tab

The Summary Tab allows the user to review the Requisition for revisions and updates prior to approving. The user can return back to a specific tab to update.

Automatic Approval = approval paths are not configured in BidBuy Train, so user will automatically approve their document.

- ✓ Review Summary Tab
- ✓ Adjust on correct Tab as needed
- ✓ Submit for Approval
- ✓ Choose Automatic approval option

### Hands-on Activity

- ✓ Attendees enter Vendor Quotes, Tabulate and Recommend Vendor
- ✓ Presenter to have the **Tabulate Informal Quotes and Recommend Vendor** slide on the overhead and walk around to assist

## Presentation - Process Purchase Order

### Process Purchase Order

After the requisition has been approved, the document will be in a 'Ready for Purchasing' status. The document is now ready for a user with the Basic Purchasing role to process.

### Convert the Requisition to Purchase Order

#### Process the Purchase Order

- ✓ Review and update tabs
- ✓ Submit the PO for Approval
- ✓ Send the PO (allows PO to go to Change Order)



### Process Purchase Order

**Step 1:** Add missing information and update tabs

**Step 2:** Submit PO for Approval

**Step 3:** Send Purchase Order

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## Instructor Online - Process Purchase Order

### Process Purchase Order (Basic Purchasing Role)

- ✓ Demo steps for processing the Purchase Order

Instructor does the following and then turns over to user to do.

### Requisition Summary Tab

The Requisition now will be in the Basic Purchasing user's Ready for Purchasing queue on the Control Center.

Upon opening the Requisition, the Basic Purchasing user should review the Summary tab. If the Requisition needs to go back to the originator for review, the BP user can Disapprove. If everything looks good, the BP user will convert to PO.

- ✓ Navigate back to Requisition as a Basic Purchasing user
- ✓ Convert to PO
  - Point out the BidBuy message confirming the user intends to convert to PO. This is an important warning for users to always read and confirm intended action.
- ✓ **Open Market Requisition - Convert to Purchase Order** screen opens
  - This screen allows the BP user to select the Vendor for the PO. If the Requisition had a recommended vendor, it will display as the "Header Recommended Vendor".
  - This screen will display different options based on

- ✓ Navigate to Requisition (Advanced Search or Control Center > Reqs > Ready for Purchasing)

- ✓ Open Requisition and review Summary tab
- ✓ Select **Convert to PO**
- ✓ Select radio button, **Single PO using Header Recommended Vendor**
- ✓ Select **Convert to PO**
- ✓ Click **OK**

The new Purchase Order number will display on Requisition Summary tab

- ✓ Click the Purchase Order number to open and process

<p>the number of Items on the PO. When reviewing the tab, each option listed with a radio button corresponds to a Vendor selection above. Read through each option to determine the appropriate action.</p> <ul style="list-style-type: none"> <li>✓ Select <b><u>Single PO using Header Recommended Vendor</u></b></li> <li>✓ Select <b>Convert to PO</b></li> <li>✓ Click OK</li> <li>✓ The new Purchase Order number will display on Requisition Summary tab <ul style="list-style-type: none"> <li>○ Click the Purchase Order number to open and process</li> </ul> </li> </ul>	
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### General Tab

<p>The Purchase Order will open to the Summary Tab. Click General Tab and work your way through the PO tabs.</p> <p>The Purchase Order populates with information from the Requisition but there are some required fields that were not available for a requisition. The required fields on the PO will be displayed in <b>Red</b>.</p> <p>Review and update the General Tab fields. The following are required when processing a Small Purchase PO.</p> <ul style="list-style-type: none"> <li>✓ <b>Is this subject to Small Business Aside?</b> = Yes</li> <li>✓ Another required field is displayed when selecting Yes to the above question, <b>Are you utilizing an active registered Small Business Set Aside Vendor?</b></li> </ul>	<ul style="list-style-type: none"> <li>✓ Type Code: C - Small Purchase</li> <li>✓ Is this subject to Small Business Set Aside?: Yes</li> <li>✓ Are you utilizing an active, registered Small Business Set Aside Vendor?: Yes</li> <li>✓ Actual Contract Begin Date: Today</li> <li>✓ Actual Contract End Date: One Year from Today</li> <li>✓ Fiscal Year of Obligation: Current Year</li> <li>✓ Transaction Code Prefix: PO</li> <li>✓ Transaction Code Suffix: Open Ended (establish Only)</li> </ul>
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### Items Tabs

<p>The Items tab was carried over from the Requisition. The Basic Purchasing user will review and update as needed.</p> <p>AIS Agencies – there is a custom filed at the bottom of each Item that will need to be populated on the PO.</p> <ul style="list-style-type: none"> <li>✓ Select the Item Number to edit</li> <li>✓ Scroll to the bottom of the Items tab &gt; General subtab</li> <li>✓ Select <b>Fixed/Variable</b> dropdown</li> <li>✓ Select Save &amp; Exit to return to the list of items</li> </ul>	<ul style="list-style-type: none"> <li>✓ Select each Item # to edit</li> <li>✓ Fixed/Variable: Fixed</li> <li>✓ Save &amp; Exit</li> </ul>
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### Vendor Tab

<p>Vendor selected when converting to PO displays. The BP user can review and confirm Vendor mailing addresses and PO Terms.</p> <p>The State has selected set terms for the following:</p> <ul style="list-style-type: none"> <li>✓ Payment Terms = N/A</li> <li>✓ Freight Terms = Freight Prepaid</li> <li>✓ Shipping Terms = F.O.B. Destination</li> </ul> <p>The following terms are available for Shipping Method:</p> <ul style="list-style-type: none"> <li>✓ Best Way</li> <li>✓ Federal Express</li> <li>✓ United Parcel Service</li> </ul>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Address Tab

<p>The <b>Ship-to Address</b> and <b>Bill to Address</b> are carried over from the Requisition document.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Accounting Tab

<p>The Account Codes are carried over from the Requisition to the Purchase Order's Items tab &gt; Accounting subtab. The header level accounting tab will not be populated.</p> <p>Select Items &gt; Accounting to show the class the Account Codes carried over from the Requisition for each Item.</p> <p>AIS Agencies</p> <ul style="list-style-type: none"> <li>✓ When the Purchase Order is 'Sent' to the vendor, the AIS/BidBuy Financial Interface is triggered and an Obligation created in AIS.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Select Items &gt; Accounting</li> <li>✓ Review Account Codes for each Item</li> </ul>
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### Routing Tab

<p>The routing that a Purchase Order must follow for approval is determined by the applicable approval paths.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the PO is submitted for approval.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly explain</li> </ul>
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### Attachments Tab

<p>Attaching Files or Forms to BidBuy documents is a useful way to include specifications or other guidelines in the user's procurement documents.</p> <p>After adding an Attachment, the BP user will need to determine whether the following should be selected. The Form to Process list will help inform the selection.</p> <ul style="list-style-type: none"> <li>✓ Show Vendor</li> <li>✓ Confidential</li> </ul> <p>The checkboxes are intended to be used together. If you select Show to Vendor and Confidential, the Attachment will be displayed to the Vendor but NOT the general public. If you select only Show to Vendor, the attachment is viewable by the Vendor AND the general public.</p> <p><u>Attachments</u> that may be added to a Small Purchase PO include:</p> <ul style="list-style-type: none"> <li>✓ BOA Over 50,000</li> <li>✓ BOA Under 50,000</li> <li>✓ Financial Disclosures &amp; Conflict of Interest</li> <li>✓ Stand Alone Contract</li> <li>✓ Standard Amendment to Vendor Form</li> </ul>	<ul style="list-style-type: none"> <li>✓ Add a file from the computer directory (can be a picture) to demonstrate how to add an attachment.</li> </ul>
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### Notes Tab

<p>The <b>Notes</b> tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p> <p>Only the user creating a note <u>may edit</u> their note.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p> <p>Reminders are sent via email (if option selected) and display on the user's Reminders Tab.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Summary Tab

<p>The PO Summary Tab allows the user to review the PO for revisions and updates prior to approval.</p> <p>Automatic Approval - approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p> <p>Upon approval, the PO will go to a 'Ready to Send' status. The</p>	<ul style="list-style-type: none"> <li>✓ Submit for Approval</li> <li>✓ Select Automatic Approval</li> </ul> <p>PO is in <b>Ready to Send</b> status</p> <ul style="list-style-type: none"> <li>✓ Select <b>Send Email and Notify Vendor</b></li> <li>✓ Save &amp; Continue</li> </ul>
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user then has an option on how to notify the vendor.

The following actions are available for vendor notification:

- ✓ **Send Email and Notify Vendor**
  - The vendor will receive an email notifying them a PO is available to retrieve from BidBuy.
  - The Vendor will need to log into BidBuy to review the PO document.
- ✓ **Set to Printed Status**
  - The vendor will NOT receive an email.
  - The Vendor can still find and review the PO document when logging into BidBuy.

The PO must be in a 'Sent' status upon completing the PO.

### Hands-on Activity

- ✓ Attendees convert the Requisition to Purchase Order and process the PO
- ✓ Presenter to have the **Process Purchase Order** slide on the overhead and walk around to assist

## Presentation - PO Change Order

### Change Order to Attach Executed Contract

If changes need to be made after it is in 'Ready to Send' or 'Sent' status, the Basic Purchaser needs to create a PO Change Order.

Not all fields are editable on Change Order. It is important to note that a Vendor CANNOT be changed on a Change Order.

To initiate the PO Change Order:

- ✓ Open the PO
- ✓ Select Change Order Tab.
- ✓ Select **Create Change Order**
- ✓ Update tabs
- ✓ Submit for Approval
- ✓ Apply the Change Order

BidBuy ILLINOIS ePROCUREMENT	Change Order to Attach Executed Contract
<p><b>Step 1:</b> Create Change Order to Attach Executed Contract</p> <p><b>Step 2:</b> Update Change Order Tabs</p> <p><b>Step 3:</b> Submit Change Order for Approval</p> <p><b>Step 4:</b> Apply the Change Order</p>	
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## Instructor Online - PO Change Order

### Process Purchase Order Change Order (Basic Purchasing Role)

- ✓ Demo steps for processing the PO Change Order

Instructor does the following and then turns over to user to do.

#### Navigate to Purchase Order

Navigate to the Purchase Order

- ✓ Documents > POs > Sent, or
- ✓ Advanced Search

- ✓ Navigate to the PO
- ✓ Documents > POs > Sent > Open Market, or
- ✓ Advanced Search
- ✓ Select Purchase Order # to open

#### Change Orders Tab

The Change Order is initiated from the Change Orders tab. The option to Create Change Order will only be available when the PO is in 'Ready to Send' or 'Sent' status.

- ✓ Click Change Orders Tab
- ✓ Select **Create Change Order**

#### Change Order > General Tab

After selecting Create Change Order, the Change Order document opens to the Items tab. Select General Tab to work your way through the document.

If any custom fields (detailed in Appendix C – Custom Columns) are modified, it is recommended to note the fields that are changed. This will be useful when updating the Change Order Summary screen.

- ✓ No Action, only review

### Change Order > Items Tab

Item information can be modified via Change Order. To edit the item, select the bold Item # to open and edit.

✓ No Action, briefly review

### Change Order > Subcontractors

Subcontractors can be modified or added via Change Order.

✓ No Action, briefly review

### Change Order > Address

The Ship-to or Bill-to Address can be modified via Change Order.

✓ No Action, briefly review

### Change Order > Accounting

Accounting can be modified via Change Order. It is recommended to only change accounting at the Items tab > Accounting subtab level during a change order.

✓ No Action, briefly review

### Change Order > Attachments

Attachments can be added via Change Order. In the example, an attachment will be added to attach the 'Executed Contract'.

After adding an Attachment, the BP user will need to determine whether the following should be selected. The Form to Process list will help inform the selection.

- ✓ Show Vendor
- ✓ Confidential

The checkboxes are intended to be used together. If you select Show to Vendor and Confidential, the Attachment will be displayed to the Vendor but NOT the general public. If you select only Show to Vendor, the attachment is viewable by the Vendor AND the general public.

- ✓ Select **Add File**
- ✓ Select **Chose File** and search your computer for a file
- ✓ Select **Save & Exit**

### Change Order > Summary

The Summary tab will display all the updates made in the Change Order. Prior to submitting the Change Order for Approval, review the Summary tab to confirm ALL updates are displayed. If changes are required, navigate back to the Tab for edits.

**IMPORTANT:** Any text entered in the **Comment for the whole change order** box will be displayed to the vendor. An email will be initiated to the vendor with the text, and they will see on the PO Change Order tab in BidBuy.

All changes will be displayed by section.

- ✓ The Description for each item can be modified for additional context for approvers and vendors to understand the change.

- ✓ Review Summary information
- ✓ Submit for Approval
- ✓ Automatic Approve
- ✓ Apply Change Order

- ✓ If a custom field was modified, the user will need to enter the specifics. Because these are custom to the State of Illinois, the system will not automatically display the field names.
- ✓ The Show to Vendor checkbox will ensure the vendor receives an email about the change AND can see the details of the change when reviewing the PO in BidBuy.

If any changes are made to the Summary screen, it is important to select **Save & Continue** prior to selecting **Submit for Approval**.

**IMPORTANT:** After the Change Order has been approved, the Basic Purchasing user will need to select 'Apply Change Order' to complete processing of the Change Order.

### Hands-on Activity

- ✓ Attendees create a Change Order to add an attachment
- ✓ Presenter to have the **Change Order to Attach Executed Contract** slide on the overhead and walk around to assist

## Presentation - Small Purchase Procurement > \$10,000

### Small Purchase Scenario – Procurement > \$10K

The second example will be for the same LED Street Lights; with the assumption the cost will be greater than \$10,000 and a Small Business Set Aside Waiver has been granted.

The hands-on example is to be handed out prior to the Demo / Hands-On

- ✓ 10 BidBuy Example Small Purchase LED Street Lights ReqBidPO

The Exercise will walk the user through the Req to Bid to PO steps. It is recommended to walk through this exercise demonstration and hands-on as the class follows along with the Instructor.

This example is a good opportunity to start the procurement process by cloning the Requisition from the first example. Cloning a document creates a copy of most of the information in the original and is an In-Progress status for the user to edit. Custom fields are not cloned with a document, so it is very important for users to still review each tab and update as needed.

Key differences between the first example (< \$10K) and second example (> \$10K):

- ✓ The Requisition will NOT include an Informal Bid
- ✓ The Basic Purchasing user will convert the Requisition to Bid to post
- ✓ The Bid document would have Informal Bid selected
- ✓ After processing the bid, the Purchase Order would be processed the same as the prior example



### Small Purchase Scenario Procurement > \$10,000

- ✓ The Illinois Department of Transportation requires LED lights. The procurement is estimated to cost over \$10,000 and an SBSA Waiver has been granted.
  - See handout for details

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## Instructor Online - Process Small Purchase > \$10,000

### Create Requisition > Bid > Purchase Order

- ✓ Demo Steps to create the Small Purchase Requisition, convert to Bid, and create a Purchase Order

It is recommended to walk through this exercise demonstration and hands-on as the class follows along with the Instructor.

The user could initiate a new Requisition document by selecting Documents > Requisition > New and then working through the tabs. In this demonstration / hands-on activity, it is recommended to initiate the new document by Cloning the Requisition created in the first exercise.

#### Clone Requisition

Navigate the Small Purchase LED Street Lights Requisition created in the initial demonstration.

Upon opening the Requisition, the user should scroll to the bottom of the Summary tab and Clone.

- ✓ Navigate back to original Requisition
- ✓ Clone Requisition
- ✓ New Requisition will be created and new Requisition number will display on the Requisition Summary Tab, "Cloned requisition is #"
  - Click the new Requisition number to open and process

- ✓ Navigate to Requisition (Advanced Search or Control Center > Reqs > Gone to PO )

- ✓ Open Requisition and scroll to the bottom of the Summary tab
- ✓ Select **Clone Requisition**

The new Requisition number will display on Requisition Summary tab

- ✓ Click the new Requisition number to open and process

#### General Tab

Upon opening the cloned Requisition, the user should navigate to the General tab and review/update each tab as required.

- ✓ Review the General Tab and update as needed. To assist with further reference to the document, it is recommended to update the Short Description.

- ✓ Short Description: Update to make unique from the original requisition
- ✓ Review other fields, update as desired.

#### Items Tab

The Items tab information is cloned from the original Requisition. The user will review and update as desired.

This scenario assumes the estimated cost will be greater than \$10,000, so the Quantity requested will be increased.

- ✓ Select each Item # to edit
- ✓ Update Quantity: 100
- ✓ Update Unit Cost: \$250
- ✓ Review other fields, update as desired.

#### Vendor Tab

The Vendors tab is cloned from the original Requisition. In this exercise, the Requisition will be converted to a Bid, so it is recommended to Delete the vendors from the Vendors tab.

- ✓ Select Delete All checkbox
- ✓ Save & Continue

When deleting vendors, a warning message will open to confirm the user intends to delete the Vendors.	✓ A message opens, “Are you sure you want to delete the selected vendor(s)”, click OK
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#### Address Tab

The Address tab information is cloned from the original Requisition. The user will review and update as desired.	✓ No Action, briefly explain
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#### Accounting Tab

The Accounting information was cloned from the original Requisition. The user will review and update as desired.	✓ No Action, briefly explain
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#### Routing Tab

<p>The routing that a requisition must follow for approval is determined by the applicable approval paths. The approval path for the requisition is displayed on the Routing Tab.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the requisition is submitted for approval.</p>	✓ No Action, briefly explain
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#### Attachments Tab

<p>The Attachments clone from the original Requisition. The scenario assumes a Small Business Set-Aside Waiver was received for this procurement. The SBSA Waiver will be attached</p> <p>✓ Attaching any file will be sufficient for the demo, but take this as an opportunity to discuss the SBSA Waiver.</p>	✓ Add a file from the computer directory (can be a picture) to demonstrate adding the SBSA Waiver.
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#### Notes Tab

The Notes tab information is cloned from the original Requisition. The user will review and update as desired.	✓ No Action, briefly explain
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#### Reminders Tab

The Reminders tab information is NOT cloned from the original Requisition.	✓ No Action, briefly explain
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### Summary Tab

<p>The Summary Tab allows the user to review the Requisition for revisions and updates prior to approving. The user can return back to a specific tab to update.</p> <p>Automatic Approval = approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p>	<ul style="list-style-type: none"> <li>✓ Review Summary Tab</li> <li>✓ Submit for Approval</li> <li>✓ Choose Automatic approval option</li> </ul>
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### Hands-on Activity (if needed)

- ✓ If attendees have not been following along with the instructor, turn over to them to work through the process to Clone their LED Street Lights document and process the Requisition.
- ✓ If an attendee did not create a Requisition for the first example to clone, the instructor can give them their Requisition Number to find using Advanced Search and use that to Clone.
- ✓ Presenter to walk around to assist.
- ✓ **Important Note:** Exercise handout, *10 BidBuy Example Small Purchase LED Street Lights ReqBidPO*, includes steps to add information to each tab of the Requisition if the user needs additional practice. **Cloning is used in the classroom environment** for this scenario to expedite the process because a similar Requisition was created in the prior example.

## Instructor Online - Process Bid

### Process Bid > Purchase Order

- ✓ Demo Steps to convert to Bid and create a Purchase Order

If the classroom was following along with the Instructor above, the following demonstration can begin immediately after all users submitting completing the Requisition.

Steps to process a Bid document were not included in the first exercise. The Instructor should use their best judgement as to whether the participants will be instructed to observe first and then execute the hands-on, or to execute the hands-on along with the instructor's demonstration.

Selecting **Basic Purchasing** Role is required to complete the remaining steps.

### Requisition Summary Tab

<p>The Requisition now will be in the Basic Purchasing user's Ready for Purchasing queue on the Control Center.</p> <p>Upon opening the Requisition, the Basic Purchasing user should review the Summary tab. If the Requisition needs to go back to the originator for review, the BP user can Disapprove. If everything looks good, the BP user will convert to Bid.</p> <ul style="list-style-type: none"> <li>✓ Navigate back to Requisition as a Basic Purchasing user</li> <li>✓ Convert to Bid</li> </ul>	<ul style="list-style-type: none"> <li>✓ Navigate to Requisition (Advanced Search or Control Center &gt; Reqs &gt; Ready for Purchasing)</li> <li>✓ Open Requisition and review Summary tab</li> <li>✓ Select <b>Convert to Bid</b></li> <li>✓ Click <b>OK</b></li> </ul> <p>The new Bid number will display on Requisition</p>
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<ul style="list-style-type: none"> <li>○ Point out the BidBuy message confirming the user intends to convert to Bid. This is an important warning for users to always read and confirm intended action.</li> </ul>	<p>Summary tab.</p> <ul style="list-style-type: none"> <li>✓ Click the Bid number to open and process.</li> </ul>
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### General Tab

<p>The Bid will open to the Summary Tab. Click General Tab and work your way through the Bid tabs.</p> <p>The Bid document populates with information from the Requisition but there are additional required fields that need to be populated. The required fields will be displayed in <b>Red</b>.</p> <p>While the Bid is an In-Progress status all fields can be edited. The approved Requisition will stay as-is and can be navigated to from the Bids &gt; Items tab for review/audit purposes.</p> <p>Review and update the General tab. The following are required when processing a Bid:</p> <ul style="list-style-type: none"> <li>✓ <b>Type Code</b> – Select 95 – Small Purchase</li> <li>✓ <b>Bid Available Date</b> – Date bid is made available to the public to view and respond</li> <li>✓ <b>Bid Opening Date</b> – Date vendor quotes are due</li> <li>✓ <b>Informal Bid</b> – select checkbox <ul style="list-style-type: none"> <li>○ An Informal Bid follows the same steps for processing and vendor quotes. The difference is that the BP user can view Vendor Quote information prior to the Bid Opening Date.</li> <li>○ The Informal Quote will only be used for Small Purchase procurements and never for procurements that meet the Formal Solicitation Threshold.</li> </ul> </li> <li>✓ <b>SPO Name</b> – SPO assigned to your Agency</li> <li>✓ <b>Is this a Small Business Set Aside?</b> – No <ul style="list-style-type: none"> <li>○ This example has an SBSA Waiver, so the response is No.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Type Code: 95 – Small Purchase</li> <li>✓ Bid Available Date: Now</li> <li>✓ Bid Opening Date: 15 minutes from now</li> <li>✓ Purchase Method: Open Market</li> <li>✓ Informal Bid: Select checkbox</li> <li>✓ SPO Name: Jane Doe</li> <li>✓ Is this subject to Small Business Set-Aside? : No</li> </ul>
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### Items Tab

The Items tab was carried over from the Requisition. The Basic	✓ No action, review only
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Purchasing user will review and update as needed.	
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#### Address Tab

The <b>Ship-to Address</b> and <b>Bill to Address</b> are carried over from the Requisition document.	✓ No action, review only
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#### Accounting Tab

Carried over from the Requisition.	✓ No action, review only
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#### Routing Tab

<p>The routing that a Bid must follow for approval is determined by the applicable approval paths.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the Bid is submitted for approval.</p>	✓ No action, briefly explain
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#### Bidders Tab

<p>The Bidders tab allows the Basic Purchasing user to look up and add vendors to receive notifications about the Bid. The user will also select whether the Bid is available to the general public to view and respond.</p> <ul style="list-style-type: none"> <li>✓ <b>Unrestricted bid</b> – available to the general public from the BidBuy login page, Open Bids section</li> <li>✓ <b>Restricted bid</b> – only available to vendors on the Bidders tab for view and response</li> </ul> <p>The example Small Purchase has a SBSA Waiver; therefore, <b>Unrestricted Bid</b> will be selected.</p> <p>Small Purchase bids without an SBSA Waiver will be Restricted bids, and only have Vendors flagged with Small Business Set Aside Category returned to the bidders tab.</p>	<ul style="list-style-type: none"> <li>✓ Lookup &amp; Add Vendors</li> <li>✓ Search by NIGP Code: <ul style="list-style-type: none"> <li>✓ NIGP Class Code: 715</li> <li>✓ NIGP Item Code: 10</li> </ul> </li> <li>✓ Select and add all Vendors</li> <li>✓ Select <b>Unrestricted bid, all vendors can view and respond</b></li> </ul>
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#### Questions Tab

The Questions tab allows the user to create specific questions for the vendor to answer with a supplied response type. The Questions become part of the Vendor's response to the Bid.	✓ Add Question as Yes/No response: Are we registered through Illinois Procurement Gateway?
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### Attachments Tab

<p>Attachments are carried over from the Requisition. Attachments can be deleted or added on the Bid.</p> <p>After adding an Attachment, the BP user will need to determine whether 'Show to Vendor' should be selected.</p> <ul style="list-style-type: none"> <li>✓ Show Vendor – selecting will show the vendor the attachment when they review the Bid</li> </ul>	<ul style="list-style-type: none"> <li>✓ No action, review only</li> </ul>
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### Notes Tab

<p>The <b>Notes</b> tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p>	<ul style="list-style-type: none"> <li>✓ No action, review only</li> </ul>
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### Amendments Tab

<p>Amendments can be created after the Bid is in Sent status. They are used to amend the bid.</p>	<ul style="list-style-type: none"> <li>✓ No action, briefly explain</li> </ul>
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### Q&A Tab

<p>The Q&amp;A tab enables vendors to ask questions of the State about the Bid. The State will not use the Q&amp;A tab to respond to questions, rather they will post all responses to vendor's Q&amp;A as an Amendment.</p>	<ul style="list-style-type: none"> <li>✓ No action, briefly explain</li> </ul>
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### Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p>	<ul style="list-style-type: none"> <li>✓ No action, review only</li> </ul>
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### Summary Tab

<p>The Summary tab allows the user to review the Bid for revisions and updates prior to approval.</p> <ul style="list-style-type: none"> <li>✓ Review information from all Tabs.</li> <li>✓ Return to a Tab to update information and Save</li> <li>✓ Submit for Approval</li> </ul> <p>After a Bid has been approved, the BP user must access the Bid and select 'Send'.</p> <p>After the bid has been Sent and the Bid Available Date is current date or prior, vendors can view online.</p>	<ul style="list-style-type: none"> <li>✓ Review Summary tab</li> <li>✓ Submit for Approval</li> <li>✓ Select Automatic Approval</li> </ul> <p>Bid status is now 'Ready to Send'</p> <ul style="list-style-type: none"> <li>✓ Select <b>Send Bid</b> to generate an email to Vendors on the Bidders tab and publish online</li> </ul> <p>Bid status is now 'Sent'</p>
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### Hands-on Activity (if needed)

- ✓ If attendees have not been following along with the instructor, turn over to them to work through the processing the Bid document.
- ✓ Presenter to walk around to assist.

## Instructor Online - Bid Open, Tabulate and Add Vendor Quotes

### Open Bid, Tabulate, and Add Vendor Quotes

- ✓ Demo steps for Opening Bid and Adding Vendor Quotes

If the classroom was following along with the Instructor above, the following demonstration can begin immediately after the Bids are in a Ready to Open status (Bid Open Date/Time). It is recommended to take a break and allow time to elapse.

**Important Note:** If the Bid is not in a Sent status prior to the Bid Opening Date, it will need to be cloned and resubmitted with a Bid Opening Date/Time that allows enough time for the bid to be completed and in Sent status prior to the date/time.

#### Navigate to Bid

<p>Navigate to your Bid document. If the Bid Opening Date/Time has passed, the document will be 'Ready to Open'.</p> <ul style="list-style-type: none"> <li>✓ Use Document Navigation for Ready to Open</li> <li>✓ Advanced Search –Using Bid Number</li> </ul> <p>If the Bid Opening Date is in the future when working through this step, an Amendment can be created to change the Bid Opening Date/Time. If an Amendment is required to change the Bid Opening for attendees, it is recommended the Instructor lead those students through the process step-by-step before continuing through the exercise.</p>	<p>Navigate to Bid:</p> <ul style="list-style-type: none"> <li>✓ Bids tab &gt; Ready to Open, or</li> <li>✓ Documents &gt; Bids &gt; Ready to Open, or</li> <li>✓ Advanced Search</li> </ul> <p>Select Bid number to open</p>
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#### Summary Tab

<p>Select the <b>Summary</b> tab</p> <p>At the bottom of the Summary tab:</p> <ul style="list-style-type: none"> <li>✓ Select <b>Open Bid</b></li> <li>✓ Then select <b>Bid Tab</b></li> </ul> <p>The Bid Tabulation process enables review of vendor quotes entered into BidBuy. After the Bid Opening Date, the Basic Purchasing user can also enter quotes on behalf of vendors that</p>	<ul style="list-style-type: none"> <li>✓ Summary tab – Select Open Bid</li> <li>✓ Summary tab – Select Bid Tab</li> </ul>
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submitted paper copies.	
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#### Bid Tab: Quotes

Select Create New Quote to enter quotes on behalf of vendors that submitted paper copies.	✓ Select <b>Create New Quote</b>
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#### New Quote: General Tab:

<p>The BP User is now entering the Quote document on behalf of the Vendor that submitted their Quote outside the system. Each tab will be populated with the information as received by the vendor.</p> <ul style="list-style-type: none"> <li>✓ Select Vendor – select the Vendor that submitted the quote you are entering</li> <li>✓ Enter Received Date – Date/Time Quote Received, it is important to enter the correct date/time the document was received</li> <li>✓ Enter additional information as is included on the Vendor's Quote</li> </ul>	<ul style="list-style-type: none"> <li>✓ Select Vendor <ul style="list-style-type: none"> <li>○ Train Vendor 1</li> </ul> </li> <li>✓ Enter Received Date – Date/Time Quote Received</li> <li>✓ Are you registered and active in the Illinois Procurement Gateway?: Yes</li> <li>✓ Did you attach Form B?: Yes</li> </ul>
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#### Quote: Items Tab:

Enter Items responses from the Vendor's Quote.	✓ Unit Cost: <b>\$175.00</b>
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#### Quote: Questions

Enter Questions responses from the Vendor's Quote.	✓ Are you registered on the Illinois Procurement Gateway?: <b>Yes</b>
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#### Quote: Terms & Conditions

Enter Terms & Condition responses from the Vendor's Quote.	<ul style="list-style-type: none"> <li>✓ Select Yes</li> <li>✓ Save &amp; Continue</li> </ul>
--	---

#### Quote: Attachments

Attach all document received by Vendor but not limited to the vendor response, Certifications and Disclosures and any other documents submitted	✓ Attach any file from your computer to serve as the Vendor Quote
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#### Quote: Summary

Review all information entered based on the Vendor's Quote. If anything entered does not match the Vendor's quote, return to	<ul style="list-style-type: none"> <li>✓ Review Summary</li> <li>✓ Select <b>Submit Quote</b> (bottom of Summary tab)</li> </ul>
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the Tab to correct.  <b>Important:</b> After a Vendor Quote has been submitted, it cannot be modified. It is <b>critical</b> the information be reviewed for accuracy prior to submitting.	✓ Select <b>Back to Bid</b> (top of Summary tab)
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## Back to Bid → Bid Tab → Create New Quote

### Bid Tab: Quotes

Navigate back to the Bid Tab (select option from bottom of Bid Summary page).	✓ Select Bid Tab on Bid Summary tab
Select Create New Quote to enter Quote for Train Vendor 2.	✓ Opens to Bid Tabulation: Quotes
	✓ Select <b>Create New Quote</b>
	✓ Select Quote # open and view Quote specifics

### New Quote: General Tab:

Continue entering the Quote information for Train Vendor 2.	✓ Select Vendor
Enter General tab responses from the Vendor's Quote.	○ Train Vendor 2
	✓ Enter Received Date – Date/Time Quote Received
	✓ Are you registered and active in the Illinois Procurement Gateway?: Yes
	✓ Did you attach Form B?: Yes

### Quote: Items Tab:

Enter Items responses from the Vendor's Quote.	✓ Unit Cost: <b>\$145.00</b>
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### Quote: Questions

Enter Questions responses from the Vendor's Quote.	✓ Are you registered on the Illinois Procurement Gateway?: <b>Yes</b>
--	---

### Quote: Terms & Conditions

Enter Terms & Condition responses from the Vendor's Quote.	✓ Select Yes
	✓ Save & Continue

### Quote: Attachments

Attach all document received by Vendor but not limited to the vendor response, Certifications and Disclosures and any other documents submitted	✓ Attach any file from your computer to serve as the Vendor Quote
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### Quote: Summary

Review all information entered based on the Vendor's Quote. If anything entered does not match the Vendor's quote, return to the Tab to correct.	<ul style="list-style-type: none"> <li>✓ Review Summary</li> <li>✓ Select <b>Submit Quote</b> (bottom of Summary tab)</li> <li>✓ Select <b>Back to Bid</b> (top of Summary tab)</li> </ul>
<p><b>Important:</b> After a Vendor Quote has been submitted, it cannot be modified. It is <b>critical</b> the information be reviewed for accuracy prior to submitting.</p>	

### Hands-on Activity (if needed)

- ✓ If attendees have not been following along with the instructor, turn over to them to work through entering the Vendor Quote information.
- ✓ Presenter to walk around to assist.

## Instructor Online - Bid Tabulate and Recommend Award

### Bid Tabulate and Recommend Award

- ✓ Demo steps to Tabulate Bid and Recommend Award

If the classroom was following along with the Instructor above, the following demonstration can begin immediately after the Vendor Quotes are submitted.

### Bid Summary Tab

Navigate to your Bid document and select the <b>Summary</b> tab.	✓ Summary tab – Select Bid Tab
At the bottom of the Summary tab:	
<ul style="list-style-type: none"> <li>✓ Select <b>Bid Tab</b></li> </ul>	

### Bid Tab: Quotes

Click Quote number to review each Quote and its Tabs	<ul style="list-style-type: none"> <li>✓ Review Vendor Quotes</li> <li>✓ Select Quote # open and view Quote specifics</li> </ul>
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### Bid Tabulation: Revisions - Not Currently Used By the State

### Bid Tab: Items

The Items tab shows side-by-side pricing by item for all quotes.	<ul style="list-style-type: none"> <li>✓ Select Vendor and Award All to low bidder <ul style="list-style-type: none"> <li>○ Train Vendor 2</li> </ul> </li> </ul>
BidBuy identifies the lowest quote price with two asterisks (**). Use this feature with caution; users must review all quote	

information prior to making a determination.	
<p>The user can select :</p> <ul style="list-style-type: none"> <li>✓ <b>Award by Item</b> – select to award by Item; if allowed, the items awarded can be to different vendors</li> <li>✓ <b>Award All</b> – select to award all Items to a single vendor</li> </ul>	

#### Bid Tab: Header Questions

Vendor responses to the Questions added to the Bid document.	✓ Review vendor responses
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#### Bid Tab: Subcontractor Tab

Only applicable if Subcontracts are made available on the Bid prior to publishing or via an Amendment.	✓ No action, briefly explain
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#### Bid Tab: Routing Tab

<p>The routing that a Bid Tabulation must follow for approval is determined by the applicable approval paths.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the bid tab is submitted for approval.</p>	✓ No action, review only
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#### Bid Tab: Attachments Tab

Attachments can be added during the Bid Tabulation process.	✓ No action, review only
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#### Bid Tab: Score - Not Currently Used By the State

#### Bid Tab: Summary Tab

<p>The Summary tab allows the user to review the Bid Tab for revisions and updates prior to approving. The user can return back to a specific tab to update.</p> <p><b>Important:</b> Upon final approval of the Bid Tab, an email is auto-generated from the system notifying vendors on the Bidders tab of the intent to award.</p>	<ul style="list-style-type: none"> <li>✓ Review Summary tab</li> <li>✓ Confirm Vendor(s) and Item(s) selected</li> <li>✓ Submit for Approval</li> <li>✓ Automatic Approval</li> <li>✓ Select <b>Back to Bid</b> (top of Bid Tab)</li> </ul>
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#### Hands-on Activity (if needed)

- ✓ If attendees have not been following along with the instructor, turn over to them to work through entering the Tabulate Bid and Recommend Award process.

- ✓ Presenter to walk around to assist.

## Instructor Online - Process Purchase Order

### Process Purchase Order

- ✓ Demo steps for processing the Purchase Order

The steps to process the Purchase Order are the same as in the prior example. It is recommended to walk through the Process PO demonstration and hands-on as the class follows along with the Instructor.

#### Bid Tab: Summary Tab

<p>Upon selecting the Bid document, the Basic Purchasing user should navigate to the Summary tab. At the bottom of the Summary Tab, the user will need to select Bid Tab. After selecting the Bid Tab, navigate to the Summary and click Create PO.</p> <ul style="list-style-type: none"> <li>✓ Select Create PO</li> <li>✓ PO is highlighted in Validation window</li> <li>✓ Click link for the PO</li> </ul>	<ul style="list-style-type: none"> <li>✓ Navigate to Bid (Advanced Search or Documents &gt; Bids &gt; Opened)</li> <li>✓ Open Bid and navigate to Summary tab</li> <li>✓ Select <b>Bid Tab</b></li> <li>✓ On the Bid Tab, select the <b>Summary tab</b></li> <li>✓ Select <b>Create PO (Purchase Order)</b></li> <li>✓ The <b>Purchase Order Creation Preview</b> screen opens</li> <li>✓ Select <b>Purchase Order creation options</b> – leave defaults</li> <li>✓ Open New Purchase Order</li> </ul>
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#### General Tab

<p>The Purchase Order will open to the Summary Tab. Click General Tab and work your way through the PO tabs.</p> <p>The Purchase Order populates with information from the Bid but there are some required fields that were not available. The required fields on the PO will be displayed in <b>Red</b>.</p> <p>Review and update the General Tab fields. The following are required when processing a Small Purchase PO.</p> <ul style="list-style-type: none"> <li>✓ <b>Is this subject to Small Business Aside? – No</b> <ul style="list-style-type: none"> <li>○ An SBSA Waiver has been granted for this procurement.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Type Code: C - Small Purchase</li> <li>✓ Is this subject to Small Business Set Aside?: No</li> <li>✓ Actual Contract Begin Date: Today</li> <li>✓ Actual Contract End Date: One Year from Today</li> <li>✓ Fiscal Year of Obligation: Current Year</li> <li>✓ Transaction Code Prefix: PO</li> <li>✓ Transaction Code Suffix: Open Ended (establish Only)</li> </ul>
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### Items Tabs

<p>The Items tab was carried over from the Bid. The Basic Purchasing user will review and update as needed.</p> <p>AIS Agencies – there is a custom filed at the bottom of each Item that will need to be populated on the PO.</p> <ul style="list-style-type: none"> <li>✓ Select the Item Number to edit</li> <li>✓ Scroll to the bottom of the Items tab &gt; General subtab</li> <li>✓ Select <b>Fixed/Variable</b> dropdown</li> <li>✓ Select Save &amp; Exit to return to the list of items</li> </ul>	<ul style="list-style-type: none"> <li>✓ Select each Item # to edit</li> <li>✓ Fixed/Variable: Fixed</li> <li>✓ Save &amp; Exit</li> </ul>
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### Vendor Tab

Vendor selected during the Bid award displays. The BP user can review and confirm Vendor mailing addresses and PO Terms.	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Address Tab

The <b>Ship-to Address</b> and <b>Bill to Address</b> are carried over from the Bid document.	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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### Accounting Tab

<p>The Account Codes are carried over from the Bid to the Purchase Order's Items tab &gt; Accounting subtab. The header level accounting tab will not be populated.</p> <p>Select Items &gt; Accounting to show the class the Account Codes carried over from the Requisition for each Item.</p>	<ul style="list-style-type: none"> <li>✓ Select Items &gt; Accounting</li> <li>✓ Review Account Codes for each Item</li> </ul>
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### Routing Tab

<p>The routing that a Purchase Order must follow for approval is determined by the applicable approval paths.</p> <p>This tab <b>remains blank until an approval path is determined</b> when the PO is submitted for approval.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly explain</li> </ul>
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### Attachments Tab

<p>Attachments are carried over from the Bid document. After adding an Attachment, the BP user will need to determine whether the following should be selected.</p> <ul style="list-style-type: none"> <li>✓ Show Vendor</li> <li>✓ Confidential</li> </ul>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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<p>The checkboxes are intended to be used together. If you select Show to Vendor and Confidential, the Attachment will be displayed to the Vendor but NOT the general public. If you select only Show to Vendor, the attachment is viewable by the Vendor AND the general public.</p>	
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#### Notes Tab

<p>The <b>Notes</b> tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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#### Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p>	<ul style="list-style-type: none"> <li>✓ No Action, briefly review</li> </ul>
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#### Summary Tab

<p>The PO Summary Tab allows the user to review the PO for revisions and updates prior to approval.</p> <p>Automatic Approval - approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p> <p>Upon approval, the PO will go to a 'Ready to Send' status. The user then has an option on how to notify the vendor.</p> <p>The following actions are available for vendor notification:</p> <ul style="list-style-type: none"> <li>✓ <b>Send Email and Notify Vendor</b> <ul style="list-style-type: none"> <li>○ The vendor will receive an email notifying them a PO is available to retrieve from BidBuy.</li> <li>○ The Vendor will need to log into BidBuy to review the PO document.</li> </ul> </li> <li>✓ <b>Set to Printed Status</b> <ul style="list-style-type: none"> <li>○ The vendor will NOT receive an email.</li> <li>○ The Vendor can still find and review the PO document when logging into BidBuy.</li> </ul> </li> </ul> <p>The PO must be in a 'Sent' status upon completing the PO.</p>	<ul style="list-style-type: none"> <li>✓ Submit for Approval</li> <li>✓ Select Automatic Approval</li> </ul> <p>PO is in <b>Ready to Send</b> status</p> <ul style="list-style-type: none"> <li>✓ Select <b>Send Email and Notify Vendor</b></li> <li>✓ Save &amp; Continue</li> </ul>
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#### Hands-on Activity (if needed)

- ✓ If attendees have not been following along with the instructor, turn over to them to work through processing the Purchase Order.

## Presentation - Small Purchase Review

### Small Purchase Document Review

Recap of the Small Purchase process.



### Review

- ✓ Small Purchases less than \$10,000 documents required to process:
  - Requisition (with an Informal Bid)
  - Purchase Order
- ✓ Small Purchases between \$10,000 and the threshold documents required to process:
  - Requisition
  - Bid
  - Purchase Order

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### Closing

Closing – Opportunity for any final comments and ask for questions



### Closing



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